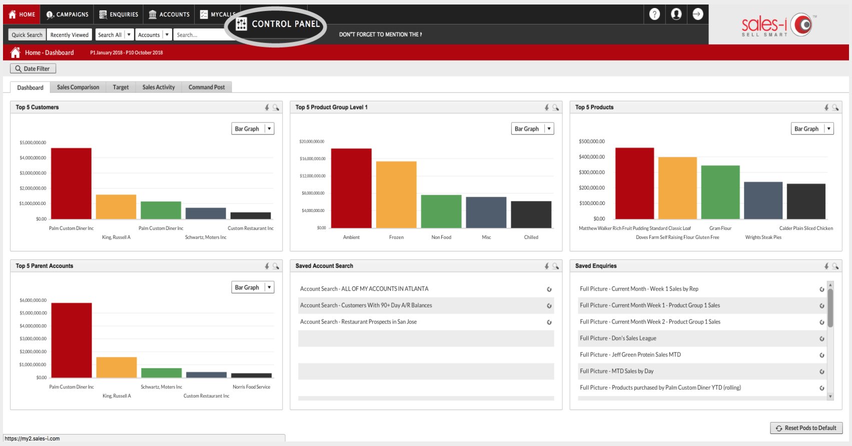
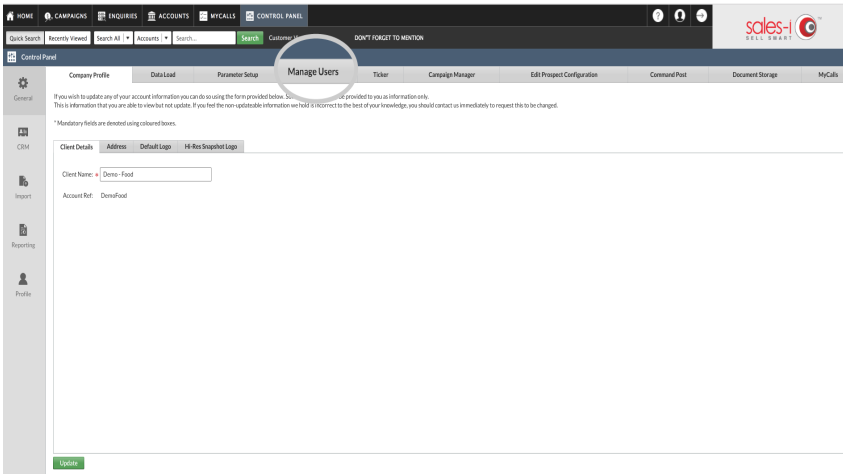
HOW TO CREATE GROUP RESTRICTIONS - POWER USERS ONLY

This guide will show you how to add users to restrictive groups so you can specify what data they can and can't see. This helps to focus your team members on the accounts, fields and areas specific to them, and means they only see the data that's key to their job role.

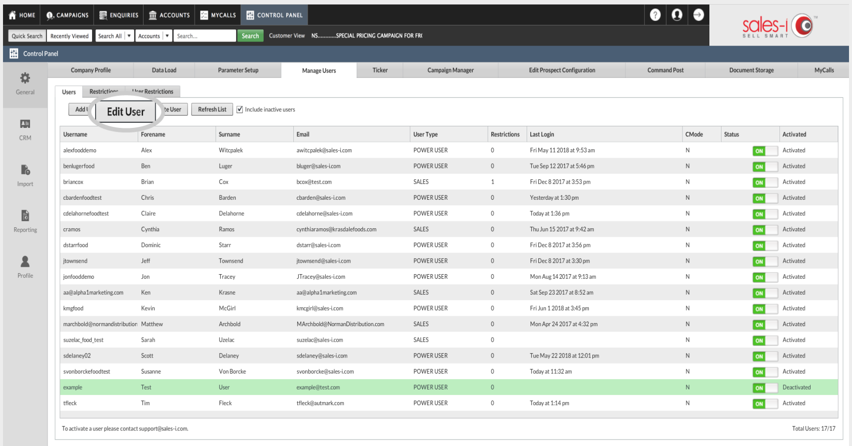
01 From the black navigation bar at the top of the screen, click **Control Panel.**



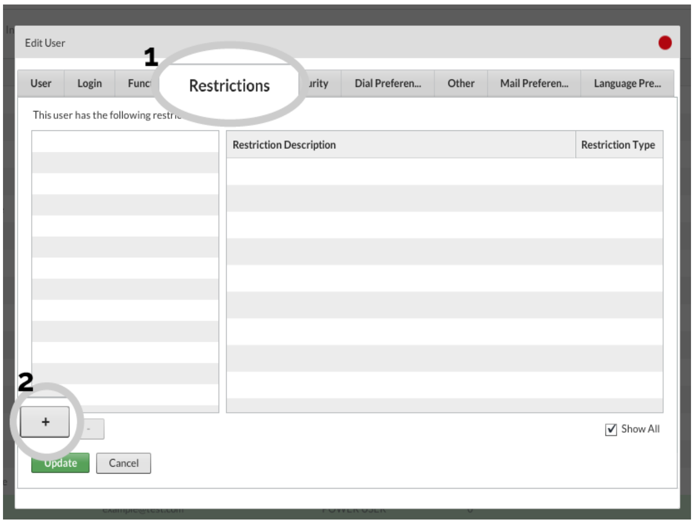


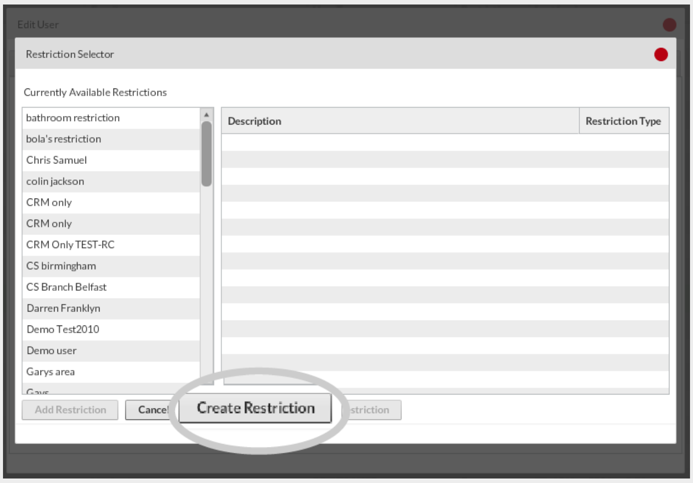
02 Click the **Manage Users** tab

03 Select the User you want to restrict, then click **Edit User**.



04 Select the **Restrictions** tab and then click the **+** icon.



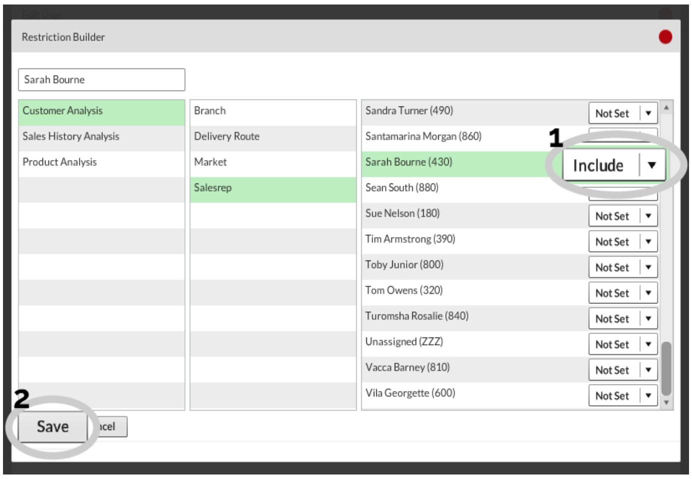


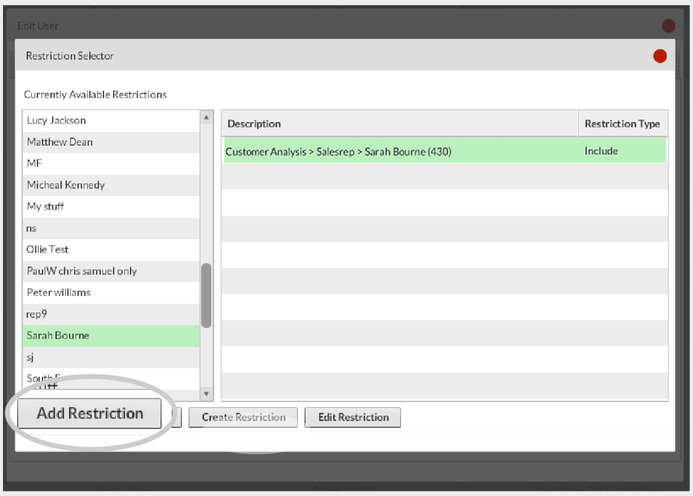
05 Click **Create Restriction.**

06 Now it's time to build your restriction:

a) Name the Group Restriction (Note: We recommend naming the restriction after the Sales Rep)
b) Select Customer Analysis
c) Select Sales Rep
d) Scroll through the list, select the sales rep code(s) this user should have access to and change the drop down from **Not Set** to **Include**.

e) Click **Save** to create this restriction.





07 Select the newly created group from the list on the left-hand side and click **Add Restriction.**

Finally, click **Update.**

The user you selected will now be restricted to see only the data you have allowed.